PACKAGING

THE CAHNERS MAGAZINE FOR DECISION-MAKERS/JUNE 1989

EXCLUSIVE: WHAT PACKAGES CONSUMERS BUY

Getting Great Detail On Labels

New Line Automates By Sections

Vote For '89 Awards

CONTENTS

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PACKAGING NEWS

Beverage makers change their stripes 8
Package design and graphics changes are the newest tactics in the soft-drink and beer marketing battles

Rice growers flip for reclosable, zippered PET bags 12

Paint can promotes wine carafes as artsy gift package 13

Vinyl jars preserve flavor of beef jerky, display product effectively 14

Vote for 1989 Innovator Awards 21
Finalists from more than 100 entries are presented for your vote

China opens its doors to packaging with two major projects 27

Snack bag essay promotes recycling legislation 39

PACKAGING FEATURES

SPECIAL REPORTS

Consumer opinions point to packaging profits 44
PACKAGING's exlusive study reveals the reasons shoppers stop and buy a package . . . or keep on walking

STATE OF THE ART

How to get brilliant results with prime labels 58
Exquisite techniques and exact registration help prime labels convey new consumer appeal

Quick Reference Chart: Prime decorating labels 61

PACKAGING OPERATIONS

Plant of the Month: All-new line automates physician samples 66
An entire line went in at once when hand packaging fell behind rising demand for these new drugs

PACKAGING TECHNOLOGY

Vision system adds "extra level of assurance" 76
Freshness codes enhance See's Candies' quality reputation 76
Carton graphics consistently meet exact color specifications 97
Updated graphics rely on proven packaging for videotape 97

DEPARTMENTS

EDITORIAL	3	PEOPLE	36	CLASSIFIED	101
PACKAGING NEWS	27	RECYCLING NEWS	39	ADVERTISERS INDEX	109
CALENDAR	28	NEW EQUIPMENT	75	WRAP UP	110
ASSOCIATIONS	32	NEW MATERIALS	95	READER SERVICE CARD	111

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RECYCLING NEWS

Snack-Bag Essay Promotes Recycling

Tiny popcorn producer urges consumer action

WHY RECYCLE?
Ancient civilization left us the pyramids of Egypt, the cities of the Incas and the Parthenon of Greece. Modern man will leave millions of tons of plastic packaging that takes centuries to degrade.
This is not a recyclable bag, but it could be. At Annie's we don't make enough bags to make it practical for recycling companies to recycle our bags. However, the snack giants use billions of non-recyclable bags. Our bags plus their bags would make recycling practical.
Further on, the phone numbers of two snack-food giants, Borden Corp. and Frito-Lay, are listed along with the name and number of a pro-recycling U.S. senator. "Your call or letter will only take a minute," reads the popcorn bag, "but can help the environment forever."
This is an unusual way to use packaging, admits Andrew Martin, but then he and his wife Ann Withey are co-founders of an unusual snack-foods company. Annie's Inc. has pledged to contribute one percent of its gross income each year to pro-environment organizations. On New England store shelves only since March 1, Annie's popcorn is a huge hit. Sales could top $1 million this year. Thus the amount going to environmental activists would exceed $10,000.
Says Martin, "We'd love it if the rest of the industry would do the same. If all the snacks companies would put that one percent away now, it would save them a lot of pain later." He insists he and his wife are not using their popcorn bag to attack Borden or Frito-Lay. "We're using the package as a means of communication from consumers to the industry. This was the only way we could generate support so that the companies know the people want recycling."
Martin says Annie's has several new products on the works and that the packaging for each of them also will be used to campaign for recycling. "Annie and I live on a farm," he explains. "The environment is the number-one key issue for us."

'Support Recycling' says the front of each bag of Annie's All Natural Popcorn. On the back is a call for consumer action and Annie's promise of funding for environmental and recycling legislation.

In the upper left-hand corner of every shiny green-and-yellow bag of Annie's All Natural Popcorn, just above the smiling face of Bernie, Annie's "rabbit of approval," is this statement: "Support Recycling."

On the back of the metallized polypropylene bag is a lengthy essay titled "Why Recycle?" It begins, "Ancient civilization left us the pyramids of Egypt, the cities of the Incas and the Parthenon of Greece. Modern man will leave millions of tons of plastic packaging that takes centuries to degrade."

A plastic package used to criticize plastic packaging? What's going on here?

The essay continues, "This is not a recyclable bag, but it could be. At Annie's we don't make enough bags to make it practical for recycling companies to recycle our bags. However, the snack giants use billions of nonrecyclable bags. Our bags plus their bags would make recycling practical."

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PET Bottles Said To Save Energy

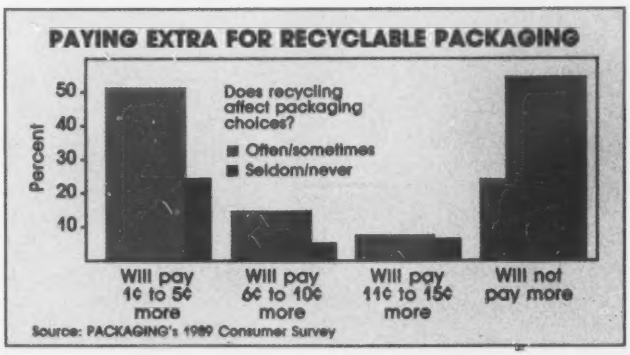
Study asserts they are highly efficient

A new study of polyethylene terephthalate soft-drink bottles by Franklin Associates asserts that PET containers are highly energy-efficient.

Commissioned by the National Association for Plastic Container Recovery, the study followed PET bottles, glass bottles and aluminum cans from cradle to grave to measure the energy consumed and waste produced by the competing containers.

One of the conclusions: At equivalent recycling rates, PET containers contribute less air pollution and are more energy-efficient to make and recycle than containers made of glass or aluminum.

Luke B. Schmidt, president of NAPCOR, says his group's objectives are to "promote plastics recycling and to achieve a 50 percent recycling rate for PET bottles by the end of 1992."



Pro-Recycling Consumers Will Pay

Most will spend extra for "friendly" packages

Of all the consumers who responded to PACKAGING's 1989 Consumer Survey, most say they are willing to put their money where their mouth is regarding packaging and the environment.

Among those who say the recyclability of packaging often or sometimes affects their purchasing decisions, 73.6 percent say they are willing to pay something extra to obtain packaging that is easily recyclable. More than 25 percent, however, say they will pay nothing extra.

Even among consumers who say the recyclability of packaging seldom or never affects their purchasing decisions, 41 percent say they are willing to pay something extra for easily recycled packages.

A full report on consumer responses to other environment-oriented questions in the survey will appear in PACKAGING's August issue.

Aluminum Sets A New Record

Recycling rate reaches 54 percent

The Can Manufacturers Institute reports that Americans recycled a record 42.5 billion aluminum soft-drink and beer cans in 1988, raising the national recycling rate to 54.6 percent.

"Clearly," says Michael Dunn, CMI president, "1988 was another banner year for the aluminum beverage can. We're moving well along toward our goal of attaining at least a 75 percent national aluminum-can recycling rate by 1995."

If that goal is reached, Americans will be recycling roughly 90 billion cans a year—nearly twice the number recycled today.

Dunn notes that the saving in energy is an extremely important benefit of aluminum recycling. Making a new beverage can from recycled aluminum requires only five percent of the energy needed to make a can from raw ore.

EXCLUSIVE PACKAGING SURVEY

CONSUMER OPINIONS POINT TO PACKAGING PROFITS

PACKAGING's exclusive study reveals the reasons shoppers stop and buy a package . . . or keep on walking

By Greg Erickson Senior Editor

Let's face it: The consumer is either your direct customer, your *customers'* customer or your customers' *customers'* customer. Consumer attitudes affect your bottom line in a significant way.

Keeping the customer satisfied, a sound business philosophy, is never a sure thing. It's next to impossible if you don't have a clue what the customer wants.

When the typical consumer goes shopping for foods or pharmaceuticals, his or her decision to either give an unfamiliar product a try or grab an old standby is made in seconds. Just by seeing packages on the shelf and holding them in the hand, shoppers make rapid-fire judgments. Then they either buy or walk away . . . without explaining why.

Which package characteristic—preservation of flavor, tamper-evident features or some other—is most highly valued by consumers? Which packaging material—metal, glass, plastic, paper—do they prefer for vegetables? For fruit? For soft drinks?

Is "convenient to open" or "value for the money" most important in pharmaceuticals packaging? How does child-resistant packaging fit into the consumer's thinking?

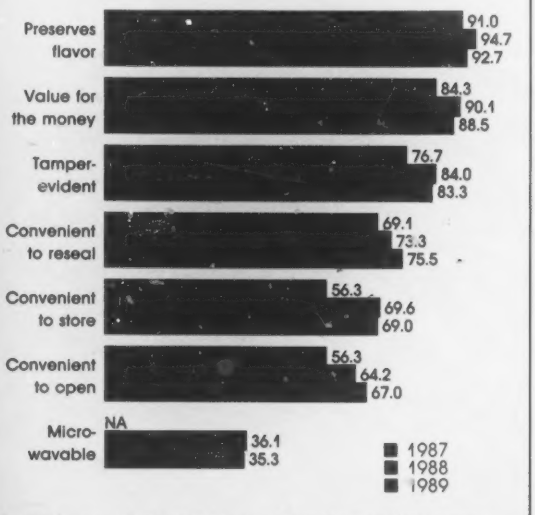
In this age of dwindling landfills and homeless garbage barges, how important is recycling becoming to the typical shopper? And just how often do consumers consider the environmental impact of packaging when making a purchase?

To provide manufacturers, suppliers and users of packaging with reliable information on changing consumer attitudes, PACKAGING conducts a nationwide survey each year. Prepared with assistance from a leading consumer-opinion research firm, the questionnaire is mailed to a demographically representative sample group. This year, of the 1,000 mailed, consumers filled out and returned 694. As a result, the margin of error is a narrow plus-or-minus four percent.

PACKAGING's survey gives consumers a chance to explain their decisions—to speak their minds on a wide range of packaging-related issues.

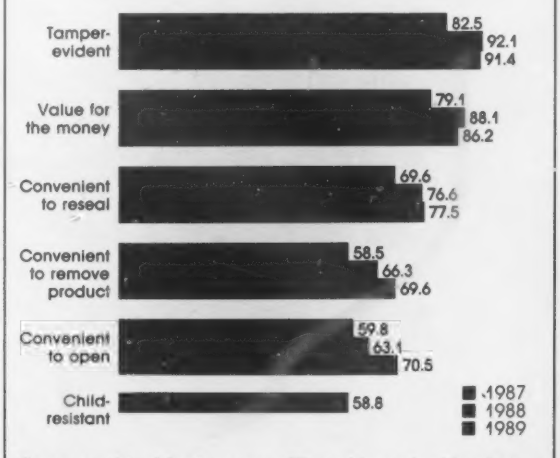
We have tabulated responses to the 44 questions by age group, lifestage (young, middle-age and older singles, couples and parents), geographical region, education and income. They are sure to have an impact on your business in the months—maybe years—to come.

FLAVOR IS NUMBER ONE

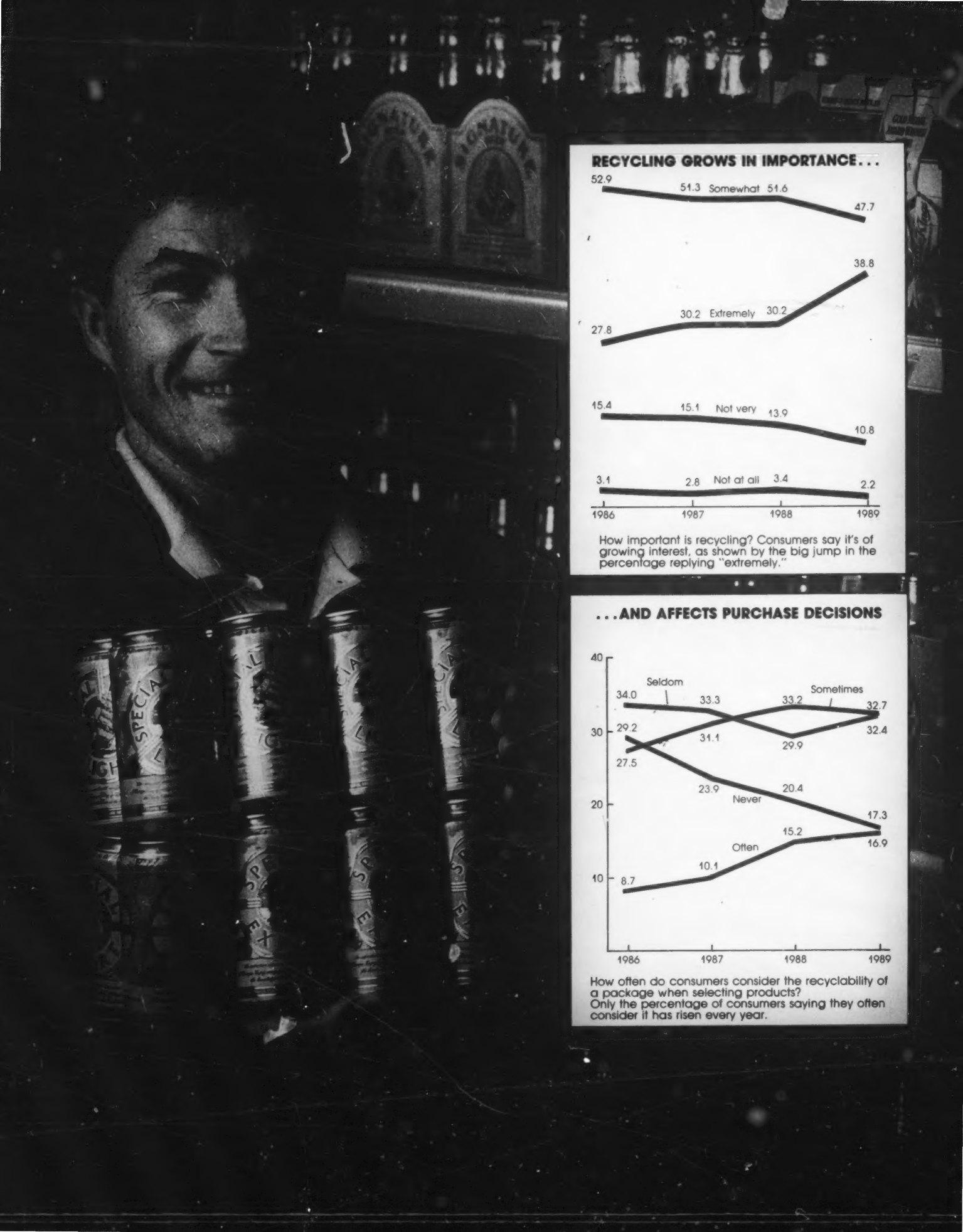


Asked to rank food-package characteristics that were "extremely/ very important," respondents put flavor at the top and microwavability at the bottom once again.

TAMPERING IS STILL A CONCERN



Tamper-evident features are still most important in pharmaceuticals packaging, topping "value for the money" for the third year in a row. Opening convenience continued its steady climb.



RECYCLING GROWS IN IMPORTANCE...

How important is recycling? Consumers say it's of growing interest, as shown by the big jump in the percentage replying "extremely."

...AND AFFECTS PURCHASE DECISIONS

How often do consumers consider the recyclability of a package when selecting products? Only the percentage of consumers saying they often consider it has risen every year.

The consumer wants food that can be zapped, but won't accept less quality overall to get it

Early in the survey questionnaire, we asked recipients to rate characteristics of foods and pharmaceuticals packaging in order of importance.

For pharmaceuticals, tamper-evident features and "value for the money" were rated the two most important package characteristics this year, as they were in 1988. Only one characteristic, "convenient to open," rose by more than four percentage points—a statistically significant increase. That attribute was voted most important by a higher percentage of consumers in the older-singles lifestage than any other. Similarly, a high percentage of retired older couples said convenience of removing the product and resealing the package were most important.

Those findings coincide with previously documented consumer criticism of pharmaceuticals closures, especially those that are child-resistant. Many consumers—older ones in particular—find child-resistant packaging to be effectively adult-resistant too.

Yet over 91 percent of young parents—the highest percentage of respondents in any lifestage—said child-resistance was the most important package characteristic for drugs. Only 44.1 percent of young singles called child resistance extremely/very important.

In foods packaging, "preserves flavor" and "value for the money" were rated most important. Those characteristics have occupied the top two spots for three years.

Much as they did regarding pharmaceuticals, more retired older couples than members of any other lifestage called "convenient to open" and "convenient to reseal" the most important characteristics for food packages.

Other highest percentages of extremely/very important votes by lifestages: "tamper-evident," retired older couples; "preserves flavor," young parents; "value for the money," middle parents; "convenient to store," older parents; "microwavable," older singles.

No zoom in zappability

That last attribute, microwavability, has remained at the bottom of the total-respondents' most-important lists from 1988 to 1989. At first that may seem at odds with statistics showing ever-greater use of microwave ovens. PACKAGING's Consumer Survey itself has revealed a rise in microwave oven use from 65.2 percent in 1986 to 84.6 in 1988. However, the growth rate slowed substantially from 1988 to 1989, rising only one-and-a-half points.

Why is that? For a rationale we went to a recent report by the research firm Find/SVP. It contains three common-sense reasons for what might be called the microwave plateau.

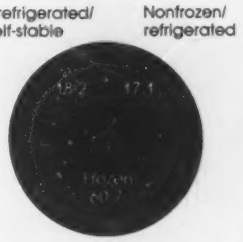
First, says the firm, many foods manufacturers initially ignored the microwave, then belatedly took interest and rushed into the market with ill-conceived products. Second, Find/SVP calls the variety of microwavable foods insufficient. And finally, according to the firm, the growth in microwavable food products has been stymied by a lack of new packaging technology.

In conclusion, the report says a major challenge faces marketers of microwavable products: They must answer consumer demands for microwave foods offering the taste, texture and overall high quality available from conventionally prepared products, and do so at a price consumers will accept. Not all succeed.

The best way to interpret the last-place position of microwavability in the package-characteristics ratings is to realize that the consumer wants foods that can be zapped in the package but won't give up flavor or value to get them.

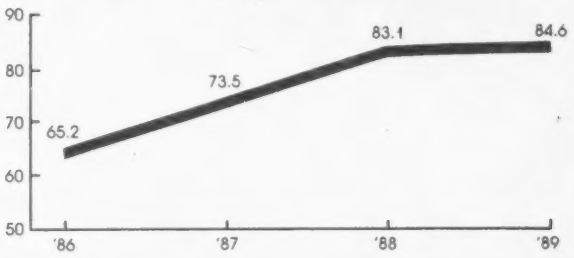
The importance of environmental issues has grown dramatically in the consumer's mind in the past year after remaining nearly flat 1986-1988. The consumer has clearly begun considering the recyclability of packaging materials when making purchase decisions. Exactly how big an effect that will have on packaging design and cost is a controversy of great concern to makers and users of packaging equipment and materials. Much of the 1989 survey was allocated to that

FROZENS RETAIN THEIR LEAD



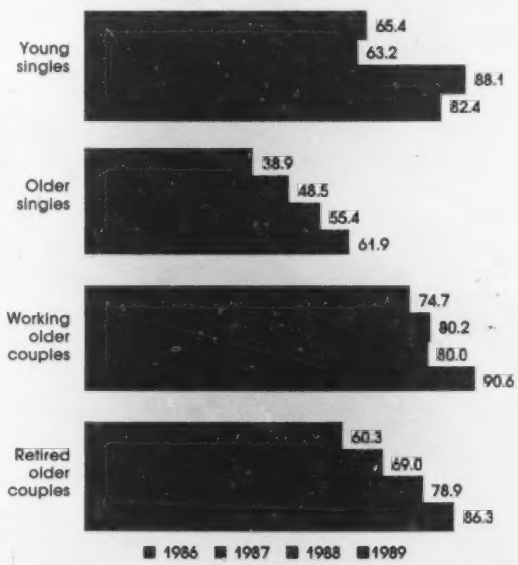
If the same entree or dinner were available in all three forms, consumers would overwhelmingly keep buying frozens.

MICROWAVE USE LEVELS OFF GENERALLY...



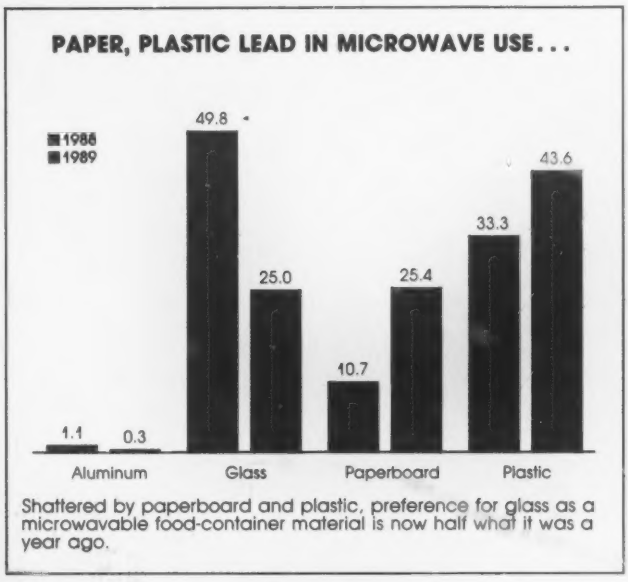
Dramatic jumps each year through 1988 brought microwave use up to 83 percent among survey respondents. Now a cooling-off period seems to have started.

...BUT GROWS AMONG OLDER CONSUMERS

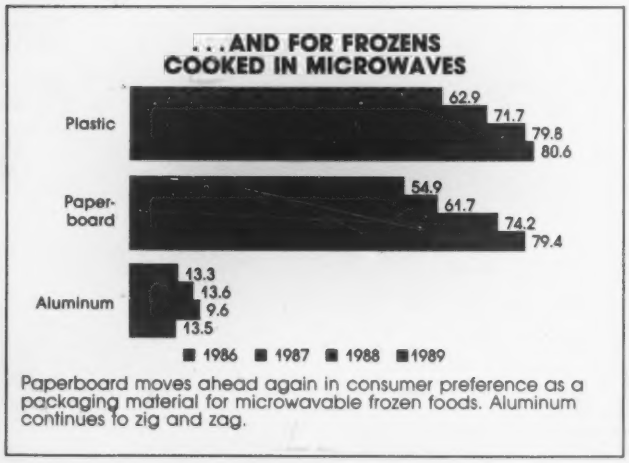


Older consumers lead the pack in increased microwave use. The percentage of young singles using microwaves fell by a surprising six percent.

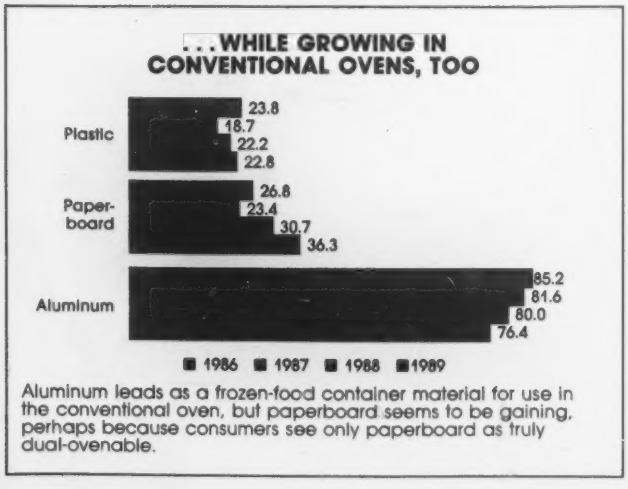
Many consumers—older ones in particular—view child-resistant drug closures as adult-resistant, too



Shattered by paperboard and plastic, preference for glass as a microwavable food-container material is now half what it was a year ago.



Paperboard moves ahead again in consumer preference as a packaging material for microwavable frozen foods. Aluminum continues to zig and zag.



Aluminum leads as a frozen-food container material for use in the conventional oven, but paperboard seems to be gaining, perhaps because consumers see only paperboard as truly dual-ovenable.

subject. Full results will be published in the August 1989 issue of PACKAGING, which will be devoted almost entirely to packaging's environmental impact. (See box.)

Surprises everywhere

For the survey's Food Package Materials Ratings, consumers stated their preferences for various package types. There's a surprise almost everywhere you look.

According to data from the Canned Food Information Council, cooked pasta is among the top three canned food products in terms of retail sales. Yet consumers revealed in both 1987 and 1988 that they in fact favored cooked pasta in glass.

In 1989, consumer preference for glass as a package for cooked pasta fell by more than eight points. But metal cans did not benefit. Instead, it was paperboard—and to a lesser extent, plastic—that gained what glass lost. Paperboard also saw the only increase in consumer preference this year as packaging for beef stew. Both of those outcomes were likely influenced by the microwave oven: The percentage of consumers saying they liked paperboard most for use in the microwave more than doubled 1988-1989.

The metal can has risen in popularity over the survey years as the package of choice for tuna and tomato sauce, quite probably because those two foods are seldom if ever microwaved in their packages. But metal fell, as did glass, in the vegetables category while plastic gained almost nine points. The most plausible explanation is that the consumer has grown fond of plastic trays for frozen and shelf-stable vegetables intended for cooking in the microwave.

Glass lost points to plastic also in the fruit category, in part, we believe, because of the successful introduction of applesauce in single-serve plastic cups. They're increasingly being included in brown-bag lunches—especially those prepared for children. And in fact, among singles, couples and parents, it was parents who gave plastic the highest percentage of preference votes as a packaging material for fruit.

Neck-and-neck for beer

Metal has gained considerably on glass as a container material for beer: The two materials are now less than one percent apart.

Beer-package preferences differ considerably by lifestage. Almost 65 percent of young singles said they preferred beer in glass; 56.2 percent of retired older couples said they favored it in cans.

For soft drinks, material preferences by lifestages went this way: 55.9 percent of young singles said they preferred glass; 35.6 percent of young parents preferred plastic; 33.0 percent of older parents preferred metal.

Paperboard seems to have taken points from both metal and plastic in the juice-drinks category. The reason may be a growing affection for the paperboard-based beverage brick. So far this package has been perceived by the consumer as chiefly intended for children. No wonder, then, that the highest percentage of respondents favoring paperboard packaging for juice drinks came from the young-parents lifestage.

Warm, chilly or icy

This year for the first time, PACKAGING asked consumers to state their preference for one of three types of entrees and/or meals: unrefrigerated shelf-stable, unfrozen refrigerated and frozen. Frozens came out far ahead. The demise of refrigerated Culinova, a new advertising campaign for shelf-stable Top Shelf and the increasing competition for store freezer space may bring about a change in this ranking by next year's survey.

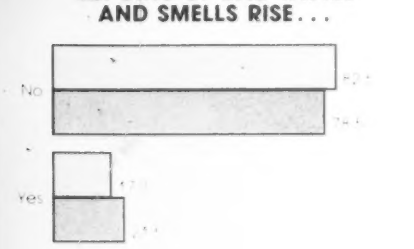
Whether frozen, refriger-

PLASTICS, PAPERBOARD GROW IN POPULARITY

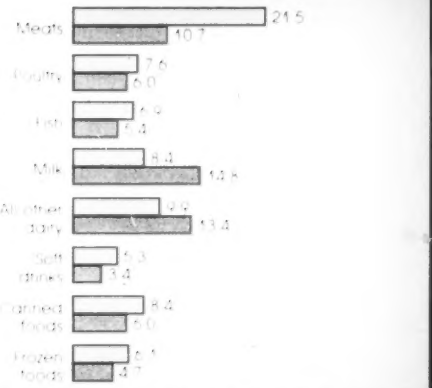
	Glass			Plastic			Metal			Paperboard			No Answer		
	87	88	89	87	88	89	87	88	89	87	88	89	87	88	89
Cooked pasta	**46.6**	**43.3**	**34.9**	**19.8**	**20.6**	**24.4**	16.0	17.7	16.9	**5.5**	**8.5**	**17.6**	9.2	4.9	6.3
Beef stew	29.3	30.0	29.7	**13.6**	**12.7**	**10.4**	47.2	51.5	50.7	**0.8**	**2.6**	**5.2**	9.2	3.2	4.0
Tuna fish	9.8	6.9	6.9	10.1	7.8	4.6	74.6	82.4	85.3	1.0	0.5	1.0	4.4	2.4	2.2
Tomato sauce	30.0	30.4	26.9	14.8	10.3	9.4	44.9	54.9	57.5	3.5	2.5	3.2	6.8	1.9	3.0
Vegetables	**25.8**	**20.4**	**16.9**	**18.2**	**17.5**	**26.4**	**45.5**	**51.5**	**44.2**	4.7	8.7	9.5	5.8	2.0	3.0
Fruit	**40.5**	**34.0**	**28.1**	**18.6**	**17.7**	**23.2**	31.5	40.7	39.6	3.3	4.4	5.6	6.1	3.2	3.3
Soft drinks	34.3	41.3	37.6	28.0	26.3	28.2	30.5	28.6	29.3	2.1	1.1	2.2	5.1	2.8	2.7
Beer	**39.5**	**45.1**	**40.8**	7.2	4.9	6.1	**34.1**	**36.8**	**40.1**	1.0	0.8	1.2	18.2	12.4	12.0
Wine	68.9	81.1	76.8	7.9	4.2	6.6	4.0	2.2	1.9	1.5	1.5	1.6	17.6	11.0	13.1
Juice drinks	NA	**55.2**	**50.9**	NA	19.6	22.8	NA	**11.5**	**6.6**	NA	**11.9**	**15.6**	NA	1.9	4.2
Drinking water	NA	NA	43.2	NA	NA	48.3	NA	NA	0.4	NA	NA	2.4	NA	NA	5.6

Which packaging materials do consumers prefer for various foods? Through the years, tastes have changed considerably. Those that have changed most are highlighted.

REPORTS OF BAD TASTES AND SMELLS RISE . . .



AS MEATS GET A REPRIEVE



The bad news is that occurrences of unwanted flavors and smells are up this year over last. The good news for meat processors is that they're no longer taking most of the blame. Dairy foods are now the biggest concern.

Has the microwave reached its saturation point? After three big jumps, use seems to be leveling off

ated or shelf-stable, the entree or meal had better offer good taste, good value and, despite the 1988-1989 slowdown mentioned earlier, microwavability.

Although use of the microwave fell in some lifestages this year, it rose in others. In accordance with demographic changes collectively termed the "graying of America" or the "senior boom," increases in microwave use were greatest in three of the four lifestages designated by the adjectives "older" and "retired." The greatest single increase 1986-1989—almost 10 points—occurred within the past 12 months and among working older couples. This year the biggest decrease—5.7 points—occurred among young singles, a group that reported a huge 25-point *increase* just one year ago.

Among packaging containers used for microwavable frozen foods, paperboard saw the biggest increase 1987-1988 and another 1988-1989. Aluminum packaging for microwavable frozen foods has zigged and zagged too much—from 13 percent to 10 percent and back again—to establish a trend. A pattern is clear, though, in the movement of aluminum for frozen foods cooked in the conventional oven: It's a steady decline.

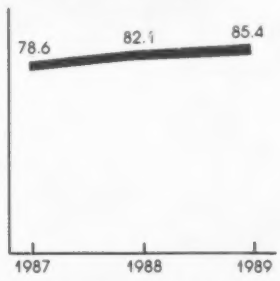
Paperboard continued its rise in popularity for frozens cooked in conventional ovens, too. That is very likely a result of the consumer's perception of paperboard as a truly dual-ovenable material, even though dual-ovenability is not seen as a particular advantage over microwavability only.

Bad tastes and smells

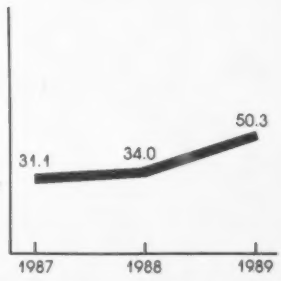
For two years now, PACKAGING has inquired whether consumers have experienced bad tastes or smells in packaged foods and followed up by asking for a description of the offending product. Troublingly, affirmative responses to the first part of the question went up this year by 4.2 percent. But there's good news for meat processors in the second part: The percentage of consumers citing meats dropped by half as criticism shifted to milk and other dairy products.

In our 1989 survey we also asked consumers to tell us about taste migration from packaging materials in microwavable foods that were cooked in the package. More than 87 percent of the respondents said they had not noticed tasting anything but the food.

CONSUMERS KEEP LOOKING FOR EVIDENCE OF TAMPERING...

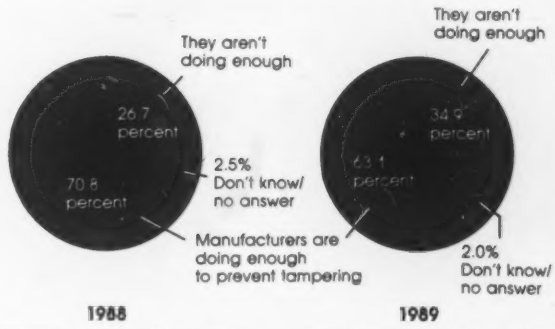


AND REJECT PRODUCTS WHEN THEY FIND IT...



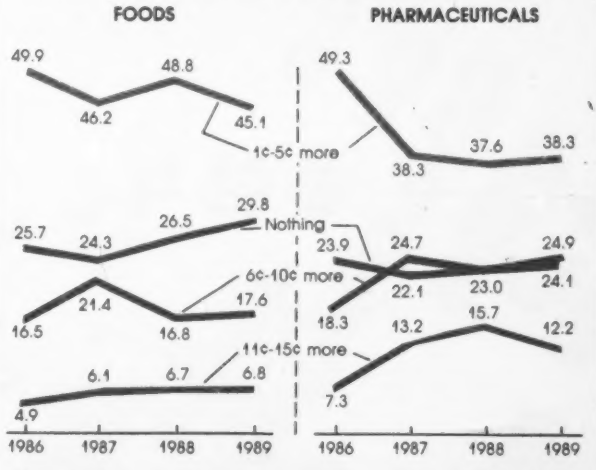
When they last purchased a food or pharmaceutical product, a growing percentage of respondents checked for signs of tampering. And product rejections for this reason are zooming.

...BUT STILL FEEL PACKAGERS ARE DOING A GOOD JOB...



Satisfaction with anti-tampering measures is nearly eight points lower this year than last, but still quite high.

...JUST DON'T EXPECT THE CONSUMER TO PAY



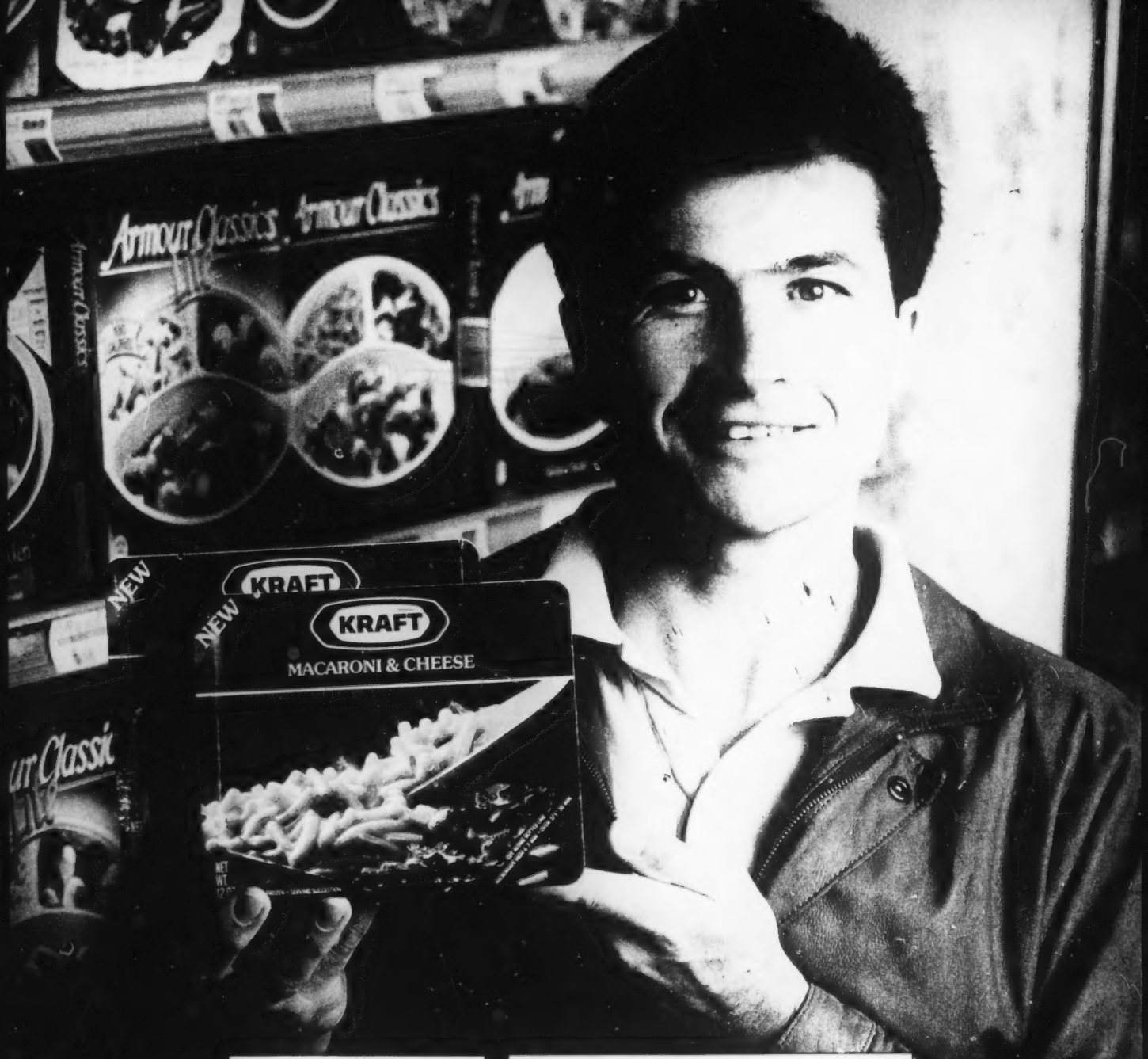
How much more will the consumer pay for a product with tamper-evident packaging versus the same product without it? Only the "nothing" lines are rising

COMING IN AUGUST: CONSUMER OPINIONS ON THE WASTE CRISIS

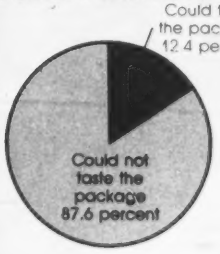
Statistics from PACKAGING's 1989 Consumer Survey show that the consumer is holding suppliers and users of packaging responsible, at least in part, for the world's waste crisis.

The environmental impact of packaging waste is a subject of great concern to all packaging professionals. In order to treat this subject in the comprehensive manner it deserves, PACKAGING will devote nearly the entire August issue to packaging and the environment.

Authorities in packaging, waste management and government will be interviewed at length on source reduction, recycling, incineration and landfilling. Also, statistics from this year's and earlier Consumer Surveys will present a realistic view of changing consumer attitudes on container deposits, current recycling efforts and package degradability among others.

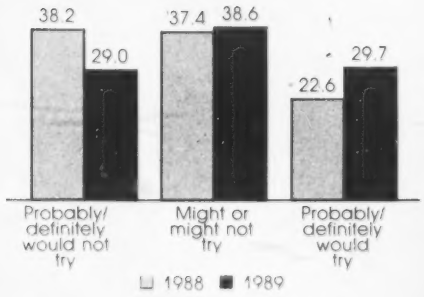


COOK-IN PACKAGING DOESN'T TASTE BAD



Nearly 90 percent of respondents say they have not found they could "taste the package" in microwavable foods left in the package for cooking.

CONSUMERS SEEM WILLING TO TRY IRRADIATED FOOD



Irradiation is almost beginning to look like an idea whose time has come. Increasingly, consumers are willing to try foods preserved this way.

As frozen-foods marketers say, refrigerated and shelf-stable meals pose little threat to frozens so far

Consumers continued to look for signs of product tampering. Over the past three years, the percent of survey respondents saying they had checked foods or pharmaceuticals packages for signs of tampering rose by almost seven points. In the same period, product rejections because of the appearance of tampering rose by almost 20 points.

Those figures can be related to consumer dissatisfaction with manufacturers' anti-tampering measures. The percentage of respondents who said they were satisfied fell from 70.8 to 63.1 points 1988-1989.

This year as before, we asked consumers which types of foods should be available in tamper-evident packages. Percentages fell in all categories 1987-1988 but rose again in all but one 1988-1989. The down-and-up course of the numbers is not as significant as the fact that consumers generally have remained concerned about tamper-evident packaging.

The percentages of consumers who said candy needed tamper-evident packaging have dropped two years in a row. Perhaps this too is related to the aging of the population. More than 73 percent of consumers from households with children said they felt candy should come in tamper-evident packaging. In childless households, the percent was 65.4.

Consumers seem increasingly unwilling to put their money where their mouth is regarding tamper-evident packaging. The only line on the "Paying Extra" chart for foods that has risen steadily and significantly is that representing consumers who would rather pay nothing extra at all.

Good-looking labels

Consumers' reliance on labeling proved to be high, and they were generally satisfied with what they saw. We asked consumers to rank their satisfaction with six label characteristics in 1988 and 1989. In both years, consumers gave the highest positive rating to "listing of ingredients," the lowest to "information about the purpose of additives." Consumers said they were less satisfied with the accuracy of label photography than with directions for product use.

The consumer's awareness of codes and expiration dates on packages this year is unchanged from 1987 and from 1988. In all three years nearly 90 percent of survey respondents said they were aware of these on-product indications of shelf life.

The Food and Drug Administration has published a reaffirmation of the safety of food irradiation and settled on labeling language for foods processed that way. Our survey shows that consumer willingness to try irradiated food has gained importance. Last year, "would not try" responses stood at nearly 40 percent; "would try" answers reached only 30 percent. In 1989, the percentage of consumers saying they probably or definitely would not try irradiated foods nearly equaled that saying they probably or definitely would.

PACKAGING will continue to update the Consumer Survey year after year to ensure that it remains relevant to current events in and around the field of packaging. ■

PLEASE RATE THIS ARTICLE

How would you rate this article? To reply, circle the appropriate number on the reader service card:

Outstanding	461
Above Average	462
Average	463
Below Average	464

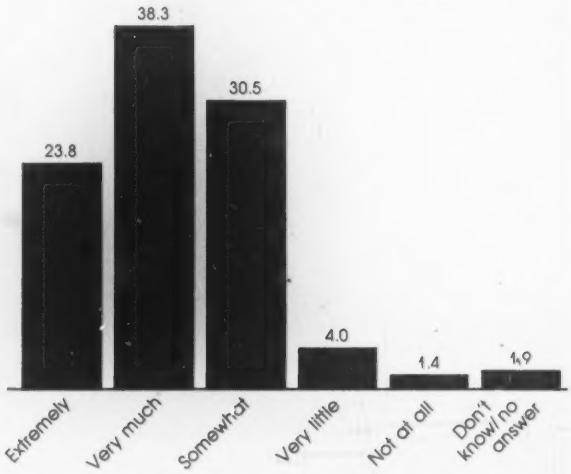
GREG ERICKSON
Senior Editor

"Once again this year the consumer provided the packaging field with more than a few surprises. But we don't design the Consumer Survey for maximum shock value. Instead, we try to make it as scientific and relevant as possible. To that end, we'd be happy to hear your comments about questions that should be added for 1990."

COMPLETE REPORT AVAILABLE

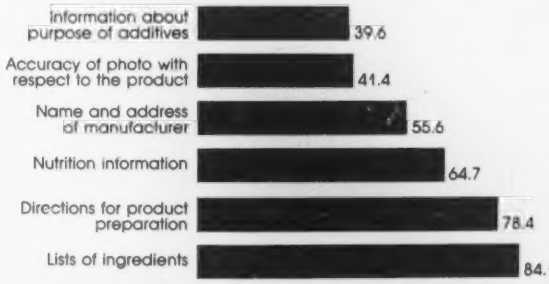
Information contained in this article was condensed from nearly 300 pages of data in PACKAGING's 1989 Consumer Survey. The complete study is available for $500. For more information, contact Consumer Survey Editor, PACKAGING magazine, Cahners Publishing Co., 1350 E. Touhy Ave., Des Plaines, Ill. 60018, or circle No. **465** on the Reader Service Card.

THEY PAY ATTENTION TO LABELS...



Most consumers say they rely on food-package labels "very much."

...AND GENERALLY LIKE WHAT THEY SEE



What consumers see on labels generally pleases them as shown by these "excellent/good" responses. Yet consumers criticize labels for skimping on information about additives and displaying inaccurate photographs of products.